

# Clackamas County Tourism Resident Sentiment Survey 2023

Clackamas County Tourism conducted this survey to collect information on residents' sentiment towards tourism in their communities. This study built on a 2019 baseline survey conducted as part of a Sustainable Destination Assessment completed by The George Washington University. The value of this information remains the same as stated by GWU in their previous research: "Local residents play a key role in the tourism ecosystem of every destination. Resident support of the tourism industry is critical to ensuring positive visitor experiences and an economically and socially viable sector that generates revenue and is well integrated into the fabric of the community."

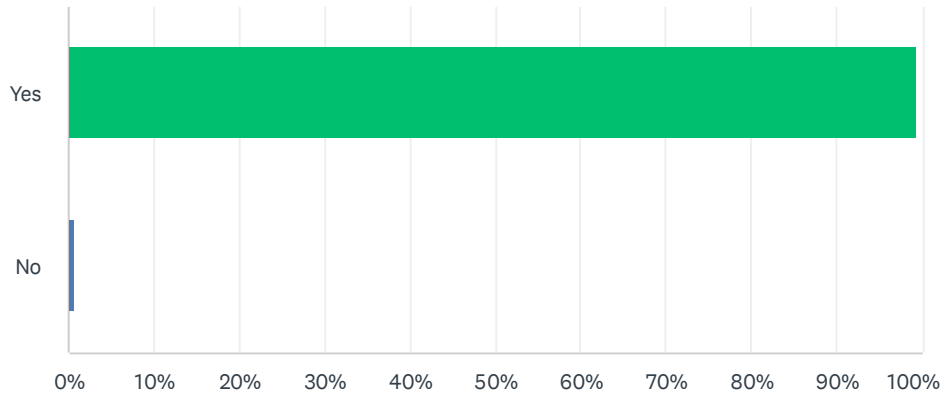
The 2023 Resident Sentiment Survey replicated questions from the 2019 baseline survey, as well as adding new topics and expanding demographic information collected to match tourism industry standards.

This survey was open from November 2 – November 30, 2023 and received 1,847 unique responses, with an 80% completion rate. The survey was promoted through Clackamas County and Clackamas County Tourism channels, newsletters and owned and paid social media. A prize drawing incentive was offered for participation.

The "Full Valley" report includes 282 responses from Canby, Aurora, Colton, Molalla, Mulino, Wilsonville, Hubbard and Scotts Mills. Open-ended question responses as well as any personal identifying data have been omitted from this report.

## Q1 Are you 18+ years old?

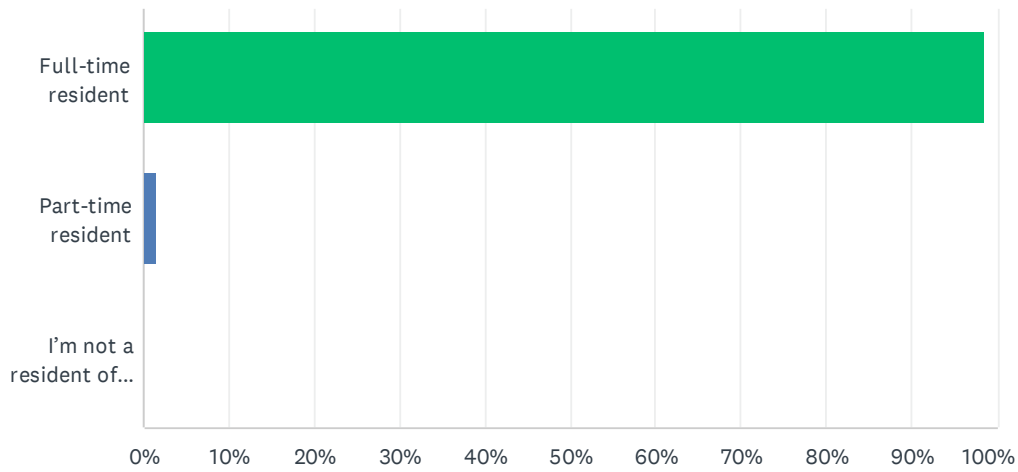
Answered: 282 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	99.29%	280
No	0.71%	2
TOTAL		282

## Q2 Are you a part- or full-time resident of Clackamas County?

Answered: 282 Skipped: 0



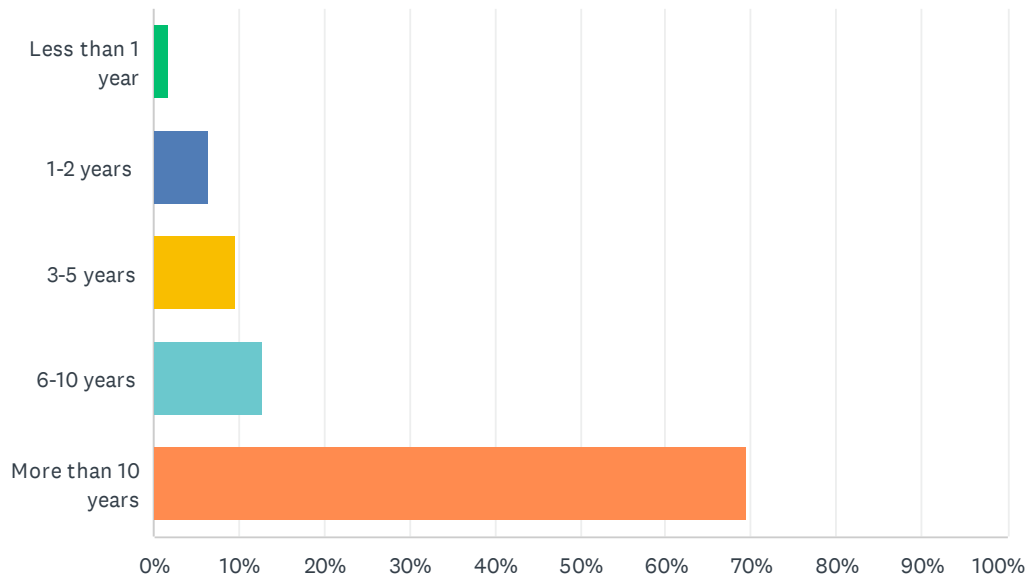
ANSWER CHOICES	RESPONSES	
Full-time resident	98.58%	278
Part-time resident	1.42%	4
I'm not a resident of Clackamas County	0.00%	0
<b>TOTAL</b>		<b>282</b>

Q3 If you are a resident of Clackamas County, what is your zip code?

Answered: 282 Skipped: 0

## Q4 How long have you lived in Clackamas County (part or full time)?

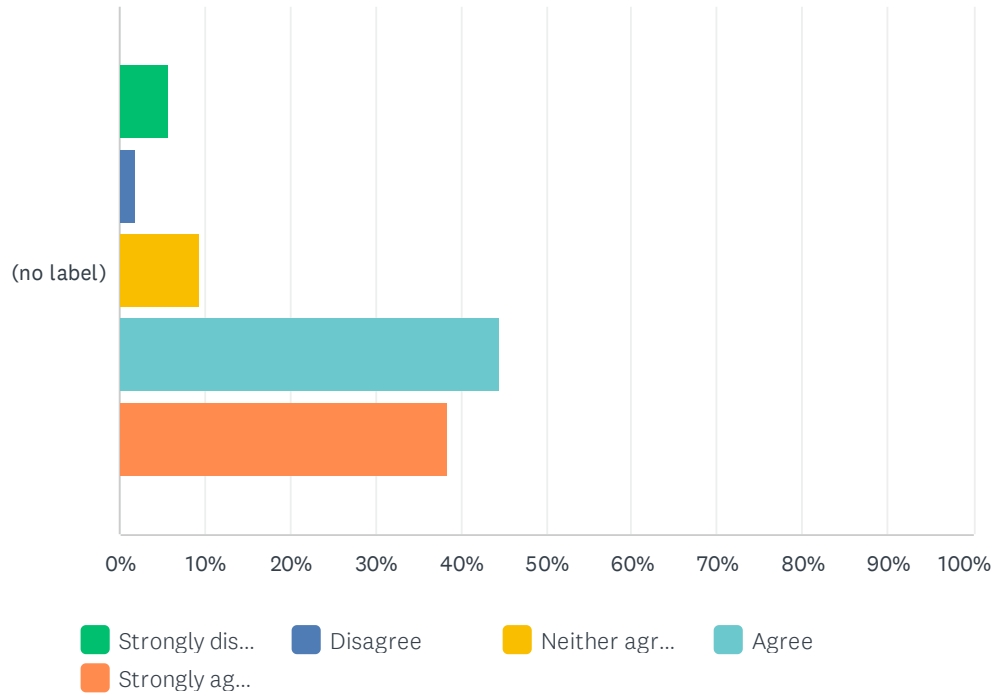
Answered: 282 Skipped: 0



ANSWER CHOICES	RESPONSES	
Less than 1 year	1.77%	5
1-2 years	6.38%	18
3-5 years	9.57%	27
6-10 years	12.77%	36
More than 10 years	69.50%	196
<b>TOTAL</b>		<b>282</b>

## Q5 There are benefits for the community from tourism within Clackamas County.

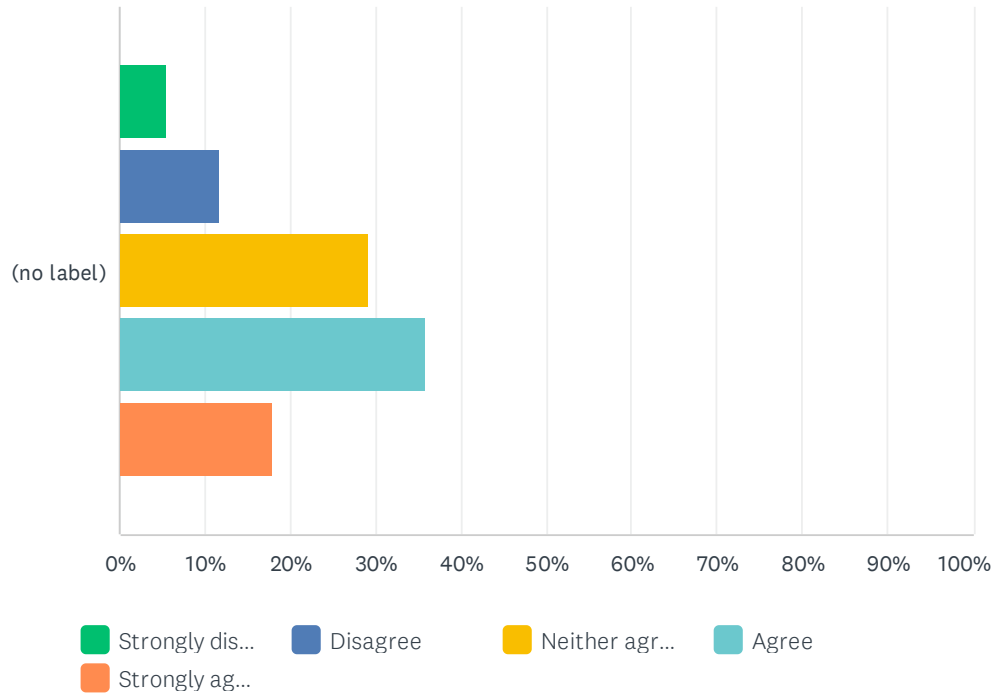
Answered: 256 Skipped: 26



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.86% 15	1.95% 5	9.38% 24	44.53% 114	38.28% 98	256	4.07

## Q6 There are benefits for myself from tourism within Clackamas County

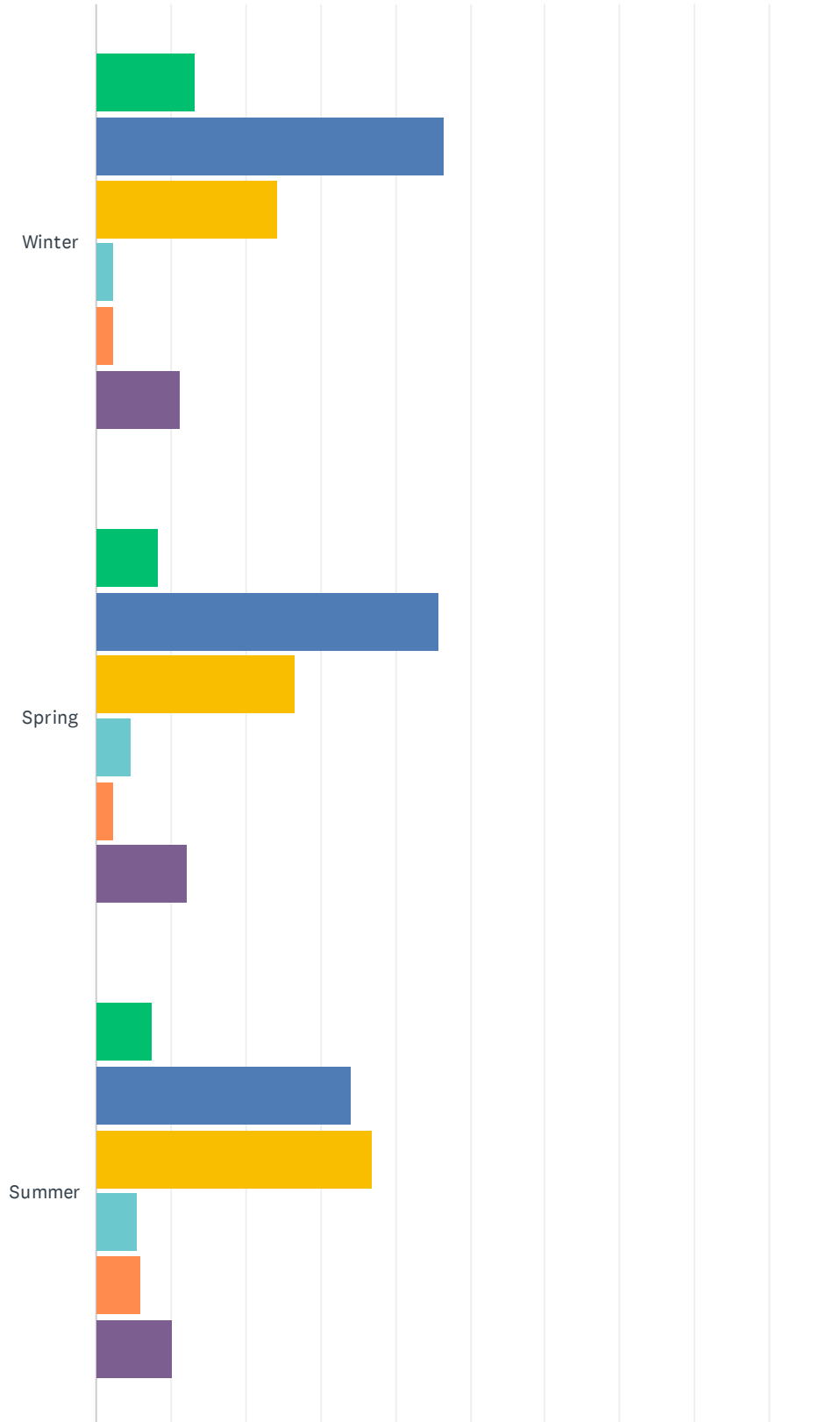
Answered: 257 Skipped: 25



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.45%	11.67%	29.18%	35.80%	17.90%	257	3.49
	14	30	75	92	46		

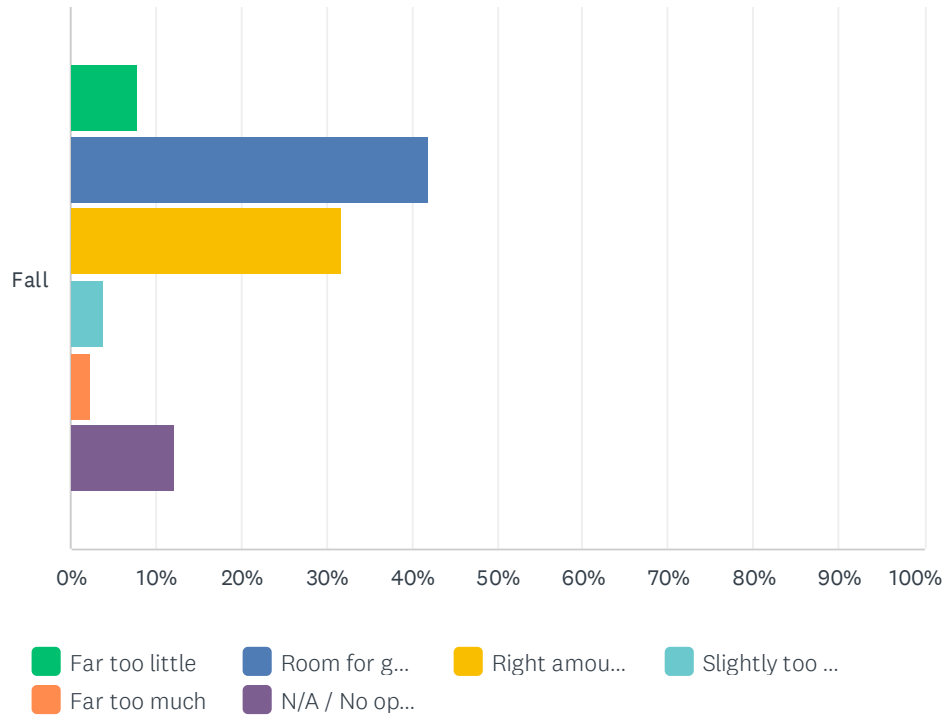
# Q7 Overall, how satisfied are you with the level of tourism activity in your community for each season?

Answered: 257 Skipped: 25





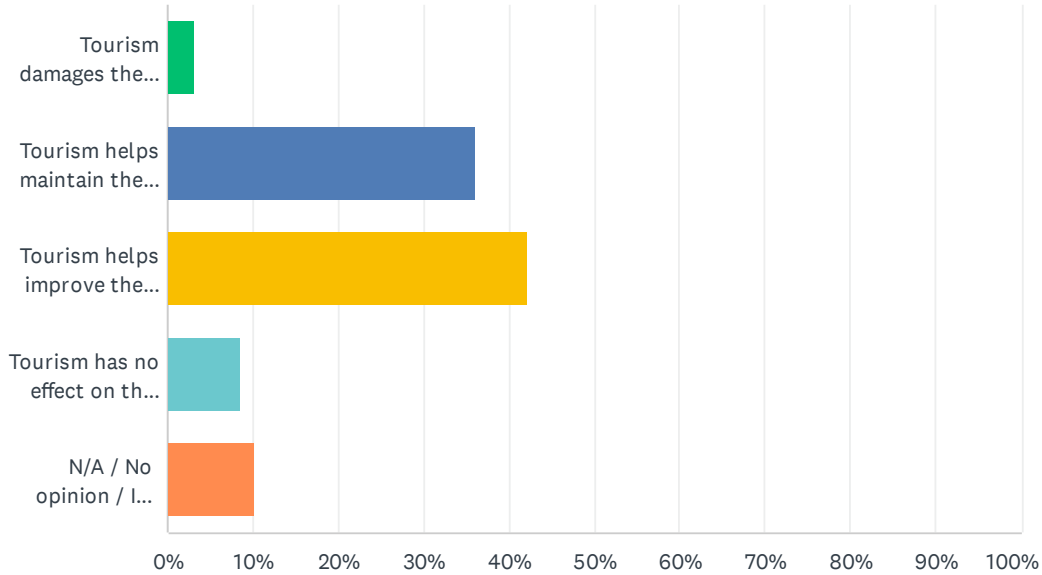
## Clackamas County Tourism: Resident Survey



	FAR TOO LITTLE	ROOM FOR GROWTH	RIGHT AMOUNT	SLIGHTLY TOO MUCH	FAR TOO MUCH	N/A / NO OPINION / I DON'T KNOW	TOTAL	WEIGHTED AVERAGE
Winter	13.28% 34	46.48% 119	24.22% 62	2.34% 6	2.34% 6	11.33% 29	256	2.26
Spring	8.24% 21	45.88% 117	26.67% 68	4.71% 12	2.35% 6	12.16% 31	255	2.40
Summer	7.45% 19	34.12% 87	36.86% 94	5.49% 14	5.88% 15	10.20% 26	255	2.65
Fall	7.84% 20	41.96% 107	31.76% 81	3.92% 10	2.35% 6	12.16% 31	255	2.44

## Q8 In your opinion, what kind of effect does tourism have on the culture and heritage of Clackamas County?

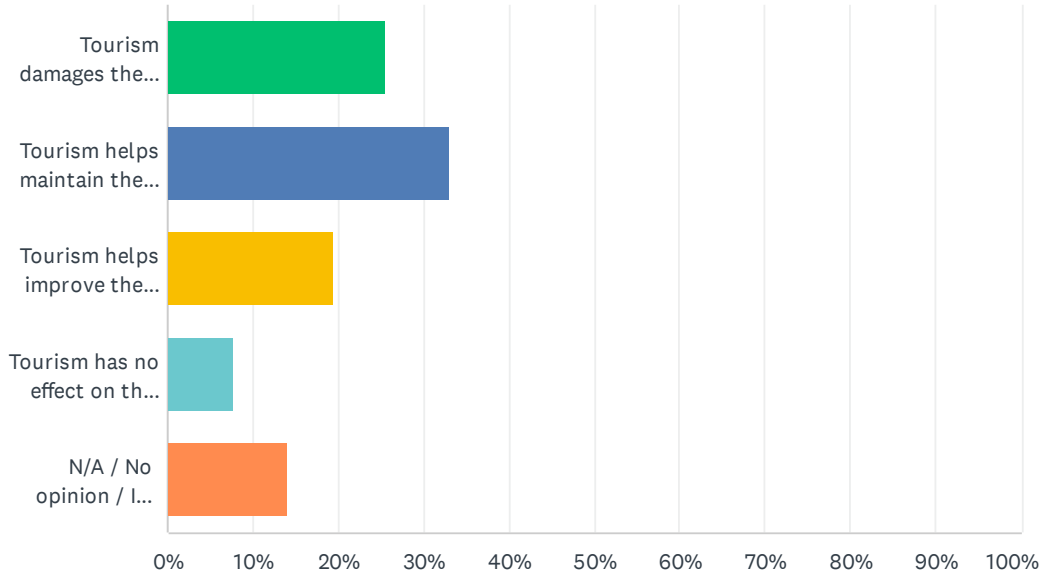
Answered: 256 Skipped: 26



ANSWER CHOICES	RESPONSES	
Tourism damages the county's culture and heritage	3.13%	8
Tourism helps maintain the county's culture and heritage	35.94%	92
Tourism helps improve the county's culture and heritage	42.19%	108
Tourism has no effect on the county's culture and heritage	8.59%	22
N/A / No opinion / I don't know	10.16%	26
<b>TOTAL</b>		<b>256</b>

## Q9 In your opinion, what kind of effect does tourism have on the natural environment of Clackamas County?

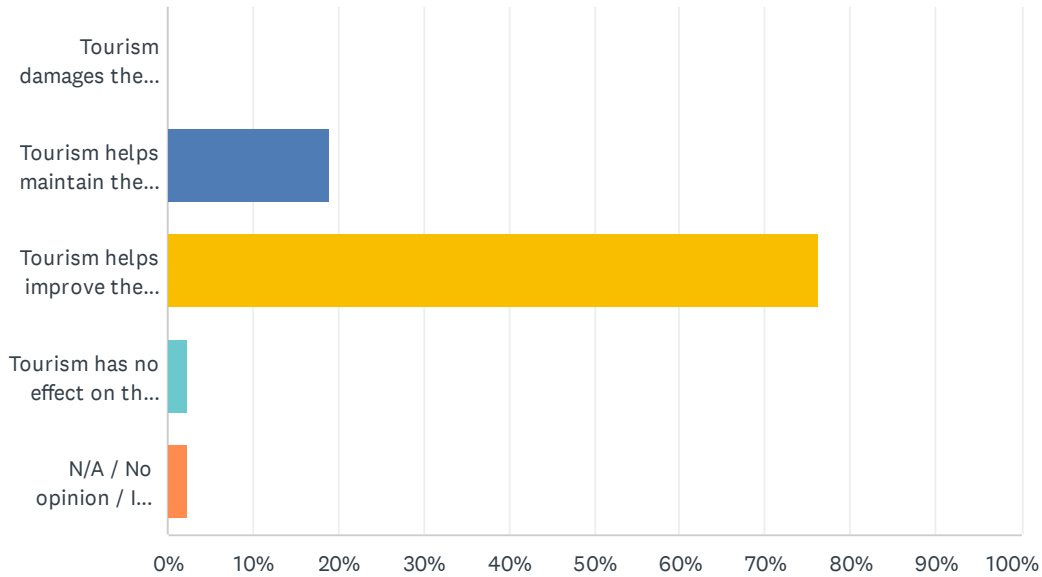
Answered: 257 Skipped: 25



ANSWER CHOICES	RESPONSES	
Tourism damages the county's natural environment	25.68%	66
Tourism helps maintain the county's natural environment	33.07%	85
Tourism helps improve the county's natural environment	19.46%	50
Tourism has no effect on the county's natural environment	7.78%	20
N/A / No opinion / I don't know	14.01%	36
<b>TOTAL</b>		<b>257</b>

## Q10 In your opinion, what kind of effect does tourism have on the economy of Clackamas County?

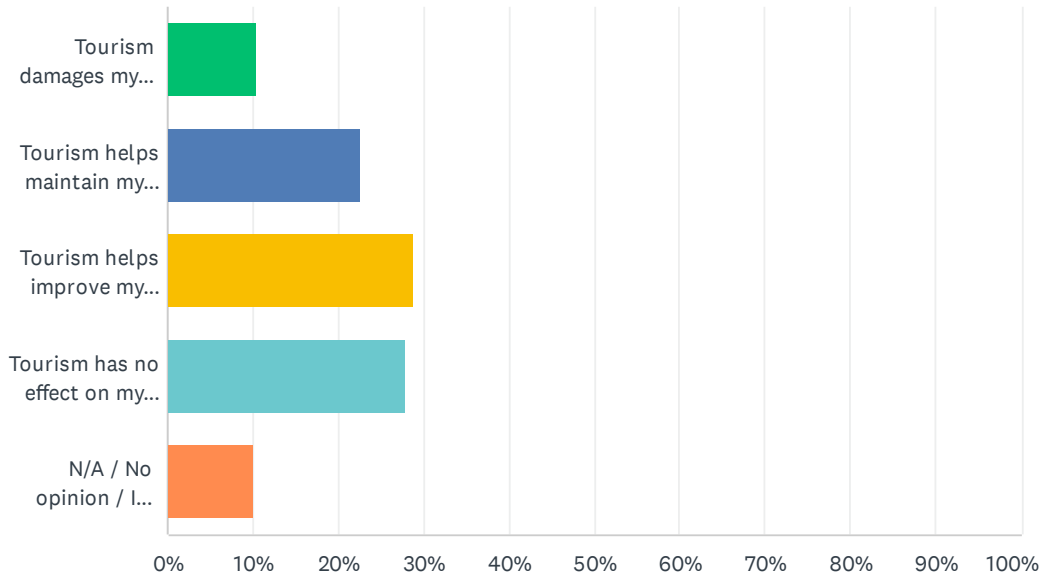
Answered: 257 Skipped: 25



ANSWER CHOICES	RESPONSES	
Tourism damages the county's economy	0.00%	0
Tourism helps maintain the county's economy	19.07%	49
Tourism helps improve the county's economy	76.26%	196
Tourism has no effect on the county's economy	2.33%	6
N/A / No opinion / I don't know	2.33%	6
<b>TOTAL</b>		<b>257</b>

## Q11 In your opinion, what kind of effect does tourism have on your quality of life in Clackamas County?

Answered: 257 Skipped: 25

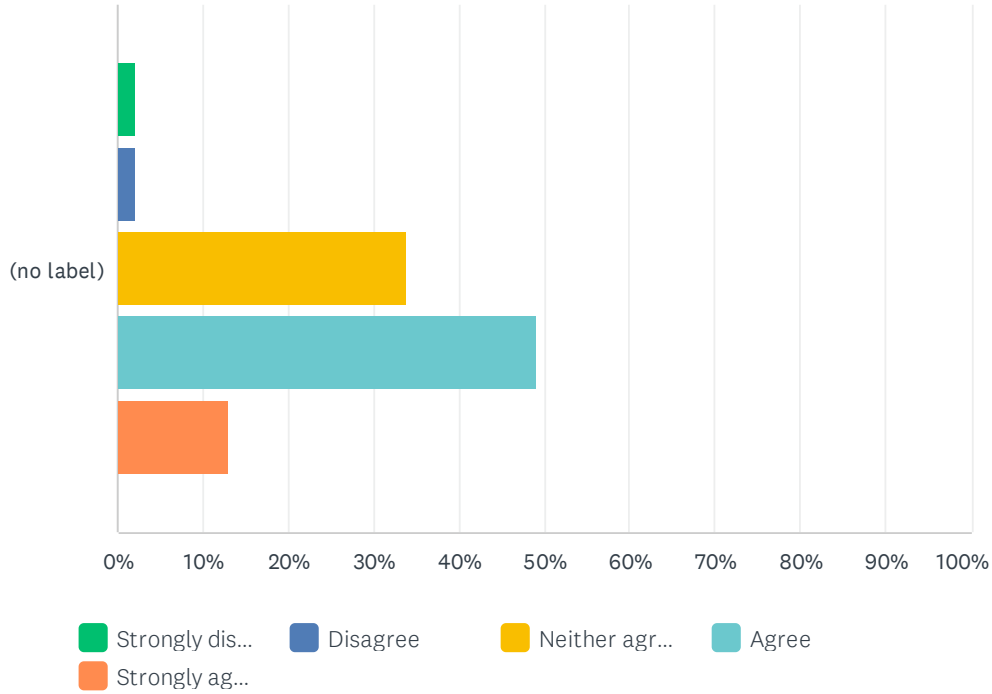


ANSWER CHOICES	RESPONSES	
Tourism damages my quality of life	10.51%	27
Tourism helps maintain my quality of life	22.57%	58
Tourism helps improve my quality of life	28.79%	74
Tourism has no effect on my quality of life	28.02%	72
N/A / No opinion / I don't know	10.12%	26
<b>TOTAL</b>		<b>257</b>



Q13 Please select your level of agreement with the following statement:  
Overall, my interactions with visitors are positive.

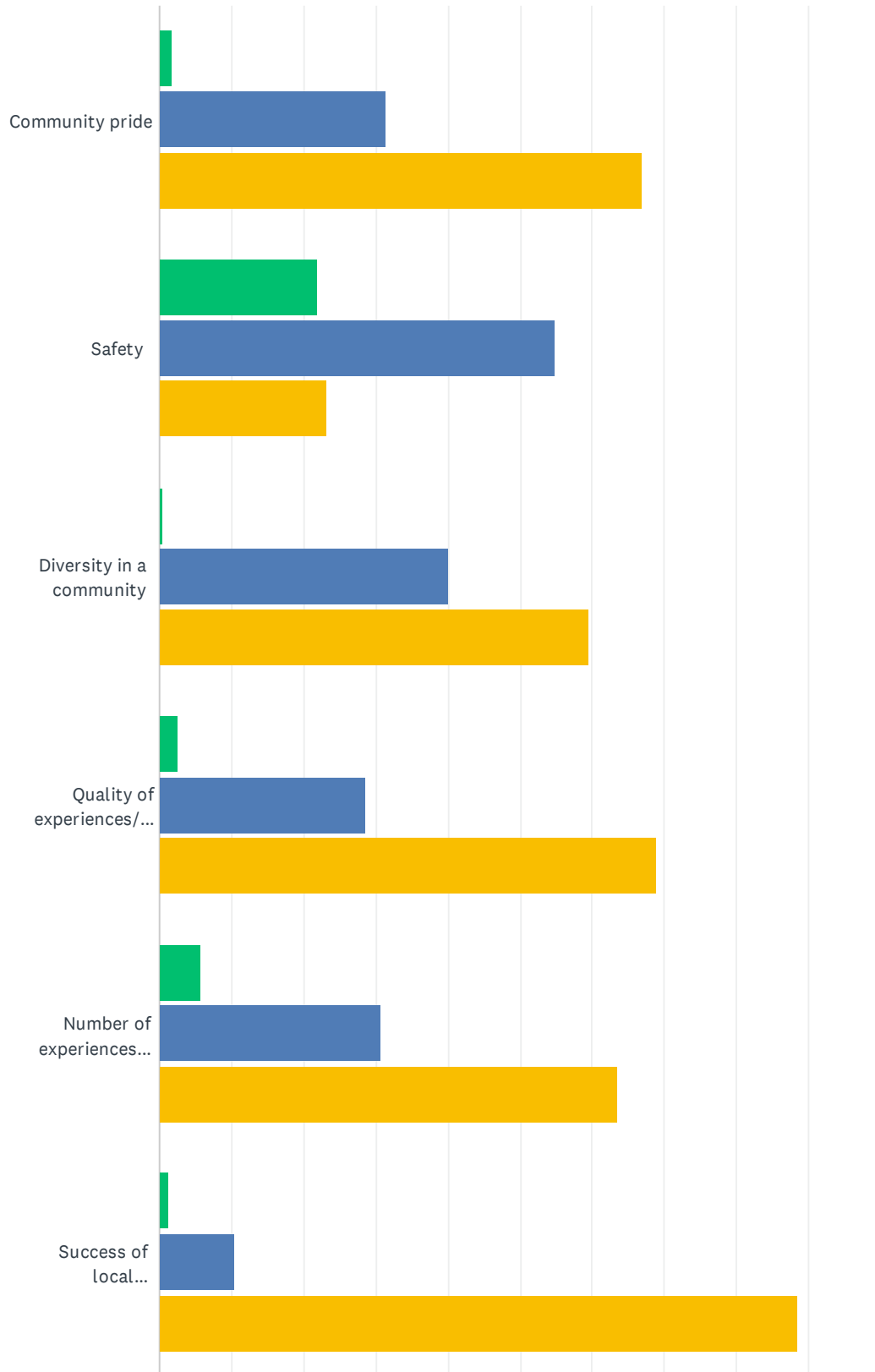
Answered: 239 Skipped: 43



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	2.09% 5	2.09% 5	33.89% 81	48.95% 117	12.97% 31	239	3.69

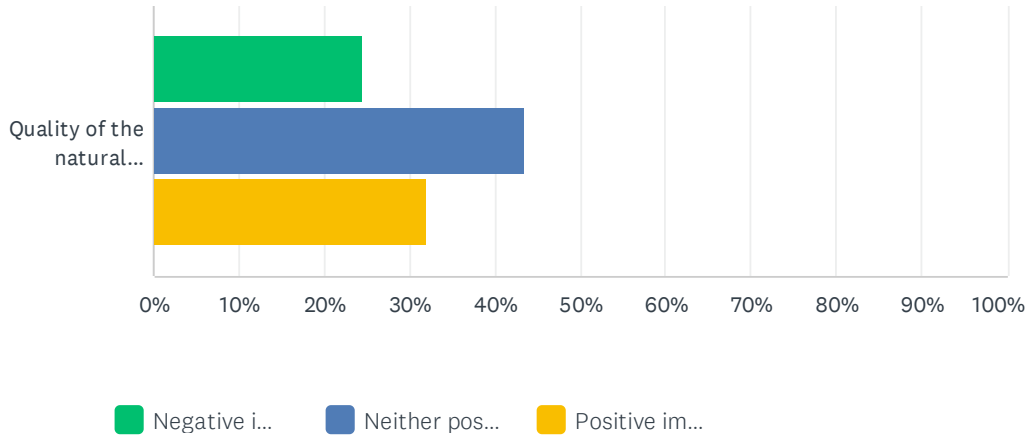
### Q14 In the chart below, please identify whether having visitors to your community positively or negatively impacts the listed aspects.

Answered: 243 Skipped: 39





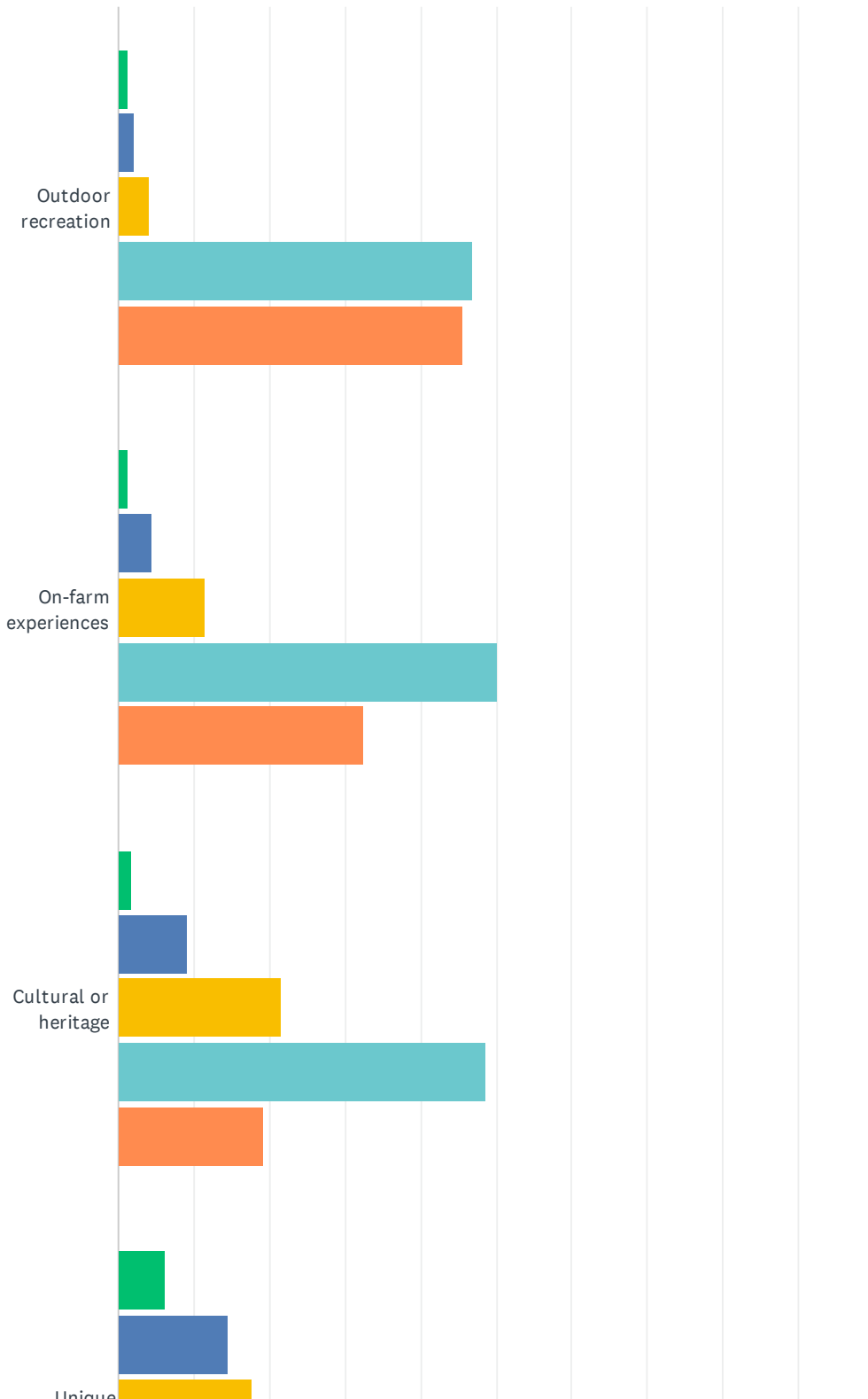
## Clackamas County Tourism: Resident Survey



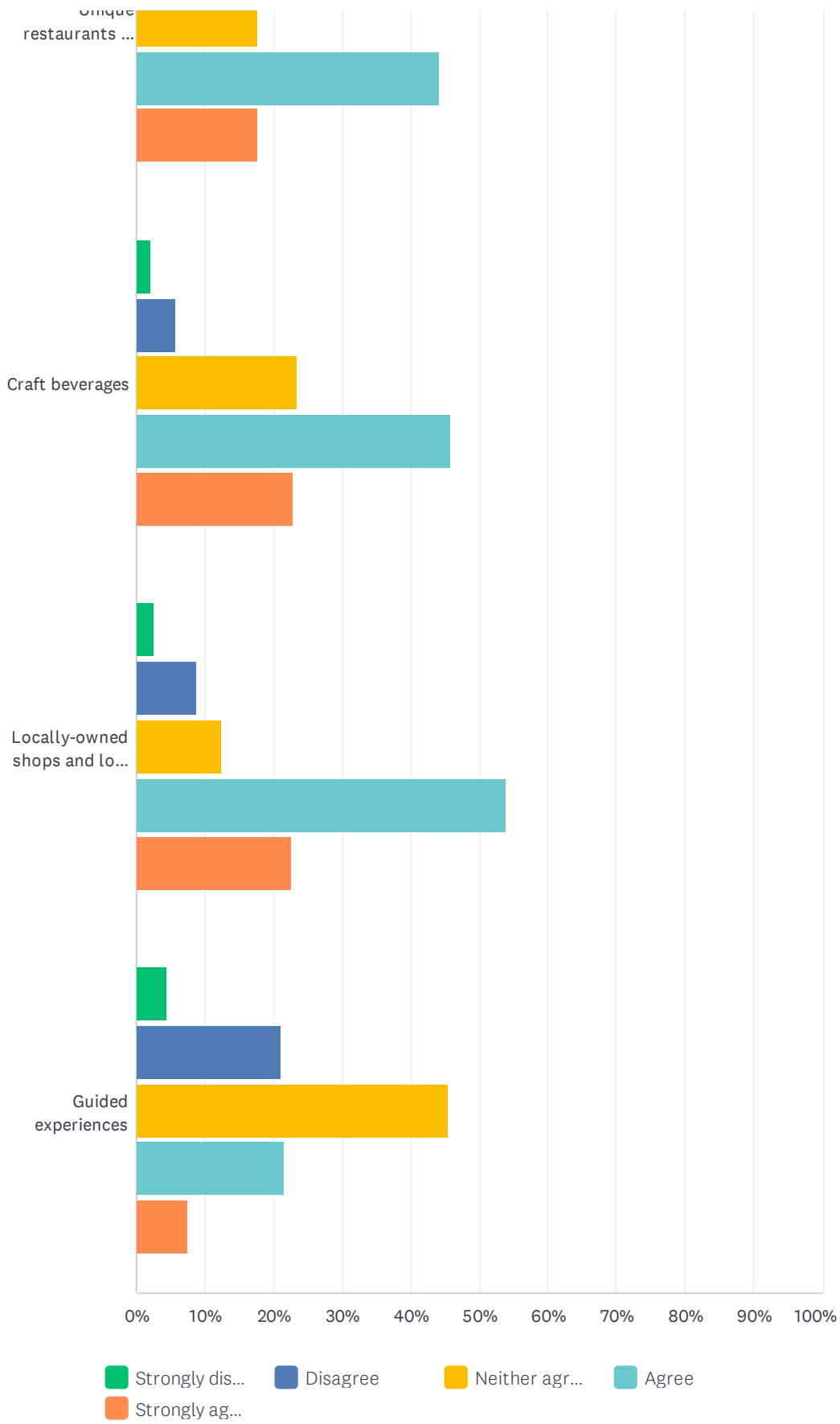
	NEGATIVE IMPACT	NEITHER POSITIVE NOR NEGATIVE	POSITIVE IMPACT	TOTAL	WEIGHTED AVERAGE
Community pride	1.65% 4	31.40% 76	66.94% 162	242	4.31
Safety	21.99% 53	54.77% 132	23.24% 56	241	3.02
Diversity in a community	0.41% 1	40.08% 97	59.50% 144	242	4.18
Quality of experiences/attractions	2.49% 6	28.63% 69	68.88% 166	241	4.33
Number of experiences available to me	5.81% 14	30.71% 74	63.49% 153	241	4.15
Success of local businesses	1.24% 3	10.37% 25	88.38% 213	241	4.74
Quality of the natural environment	24.48% 59	43.57% 105	31.95% 77	241	3.15

Q15 In the chart below, please rate your level of agreement with the following statements: "In Clackamas County, I personally have access to..."

Answered: 243 Skipped: 39



# Clackamas County Tourism: Resident Survey



## Clackamas County Tourism: Resident Survey

	<b>STRONGLY DISAGREE</b>	<b>DISAGREE</b>	<b>NEITHER AGREE NOR DISAGREE</b>	<b>AGREE</b>	<b>STRONGLY AGREE</b>	<b>TOTAL</b>	<b>WEIGHTED AVERAGE</b>
Outdoor recreation	1.23% 3	2.06% 5	4.12% 10	46.91% 114	45.68% 111	243	4.34
On-farm experiences	1.23% 3	4.53% 11	11.52% 28	50.21% 122	32.51% 79	243	4.08
Cultural or heritage	1.66% 4	9.13% 22	21.58% 52	48.55% 117	19.09% 46	241	3.74
Unique restaurants or culinary experiences	6.17% 15	14.40% 35	17.70% 43	44.03% 107	17.70% 43	243	3.53
Craft beverages	2.07% 5	5.79% 14	23.55% 57	45.87% 111	22.73% 55	242	3.81
Locally-owned shops and local products	2.47% 6	8.64% 21	12.35% 30	53.91% 131	22.63% 55	243	3.86
Guided experiences	4.55% 11	21.07% 51	45.45% 110	21.49% 52	7.44% 18	242	3.06

**Q16 If you listed “Strongly disagree” or “Disagree” with any of the choices above, please explain why below.**

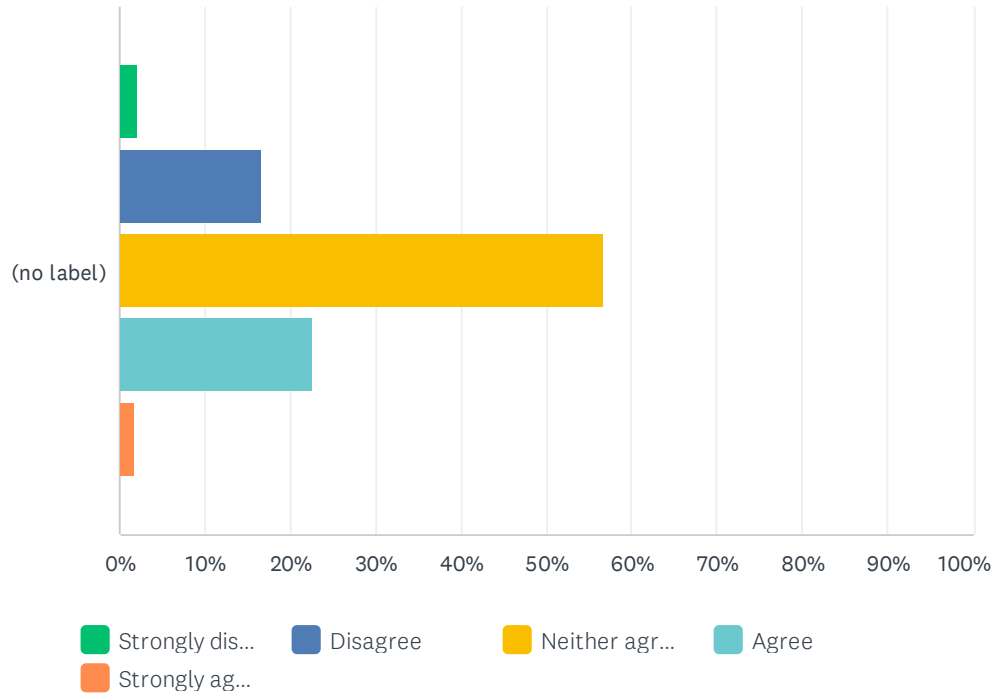
Answered: 66 Skipped: 216

Q17 What places/experience in Clackamas County would you like to see improved and how so?

Answered: 141 Skipped: 141

## Q18 Overall, I am very satisfied with residents' involvement and influence in tourism development in Clackamas County.

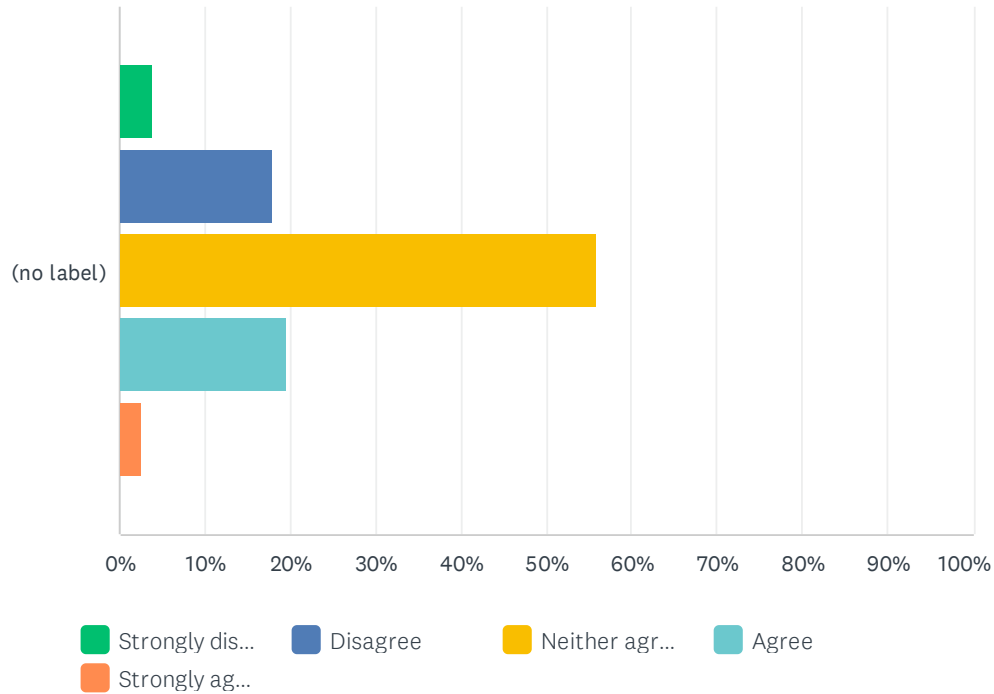
Answered: 229 Skipped: 53



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	2.18%	16.59%	56.77%	22.71%	1.75%	229	3.05
	5	38	130	52	4		

## Q19 Overall, residents' concerns regarding tourism development are addressed in Clackamas County.

Answered: 229 Skipped: 53



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	3.93% 9	17.90% 41	55.90% 128	19.65% 45	2.62% 6	229	2.99

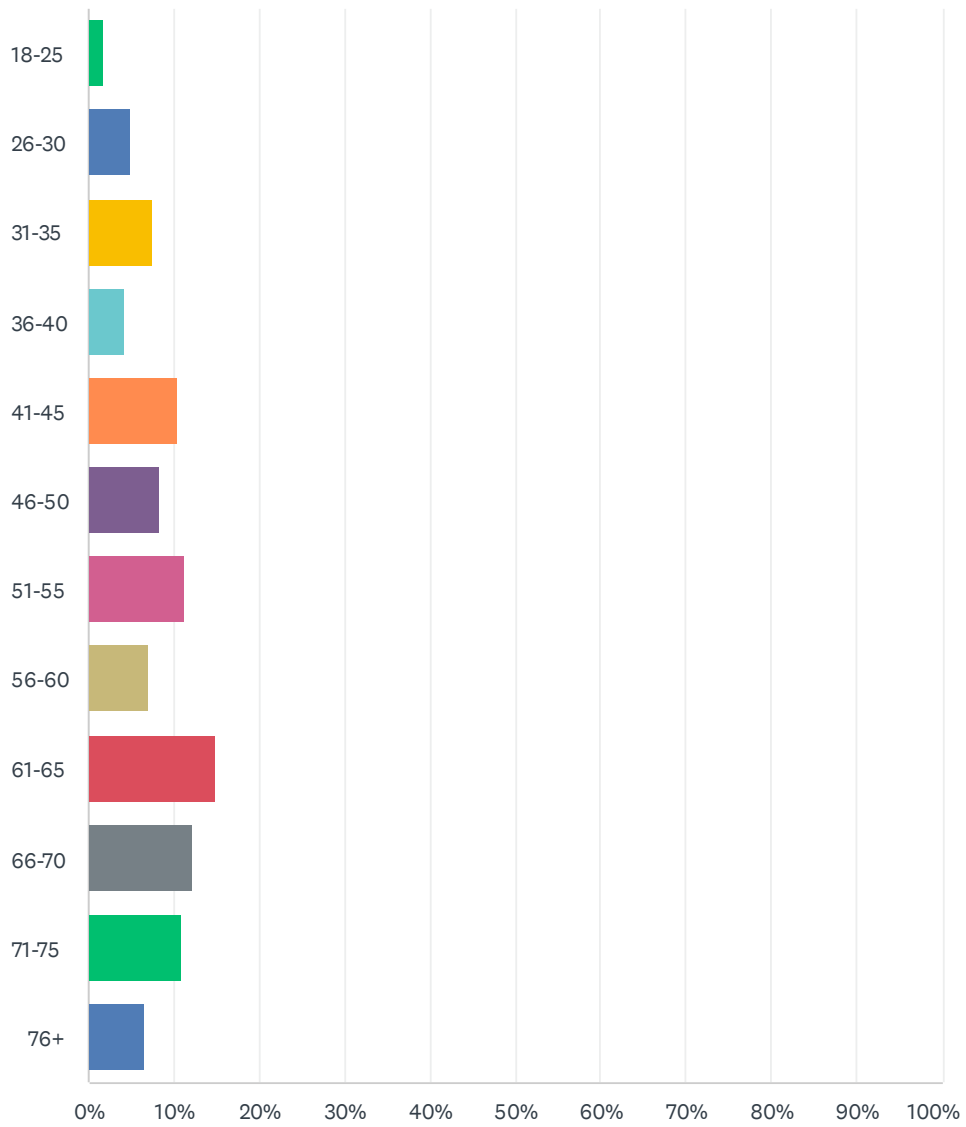


**Q20 Do you have any comments, questions, or concerns related to tourism in Clackamas County?**

Answered: 80 Skipped: 202

## Q21 What is your age?

Answered: 229 Skipped: 53

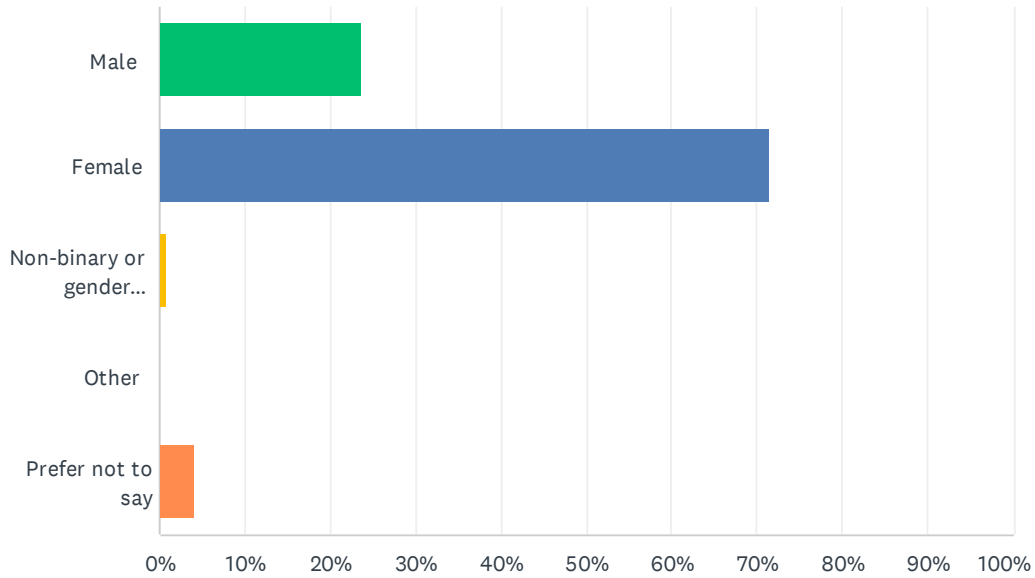


## Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
18-25	1.75%	4
26-30	4.80%	11
31-35	7.42%	17
36-40	4.37%	10
41-45	10.48%	24
46-50	8.30%	19
51-55	11.35%	26
56-60	6.99%	16
61-65	14.85%	34
66-70	12.23%	28
71-75	10.92%	25
76+	6.55%	15
<b>TOTAL</b>		<b>229</b>

## Q22 With what gender do you identify?

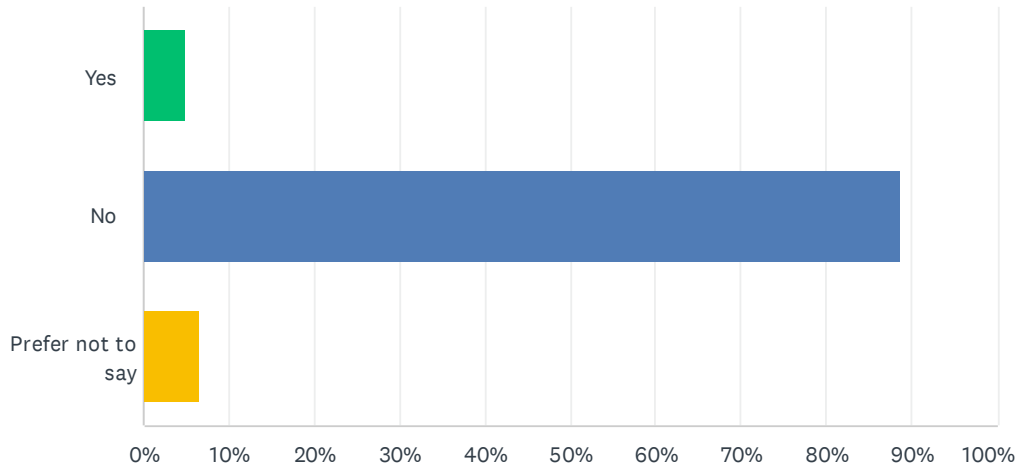
Answered: 228 Skipped: 54



ANSWER CHOICES	RESPONSES	
Male	23.68%	54
Female	71.49%	163
Non-binary or gender non-conforming	0.88%	2
Other	0.00%	0
Prefer not to say	3.95%	9
<b>TOTAL</b>		<b>228</b>

## Q23 Do you identify as part of the LGBTQ+ community?

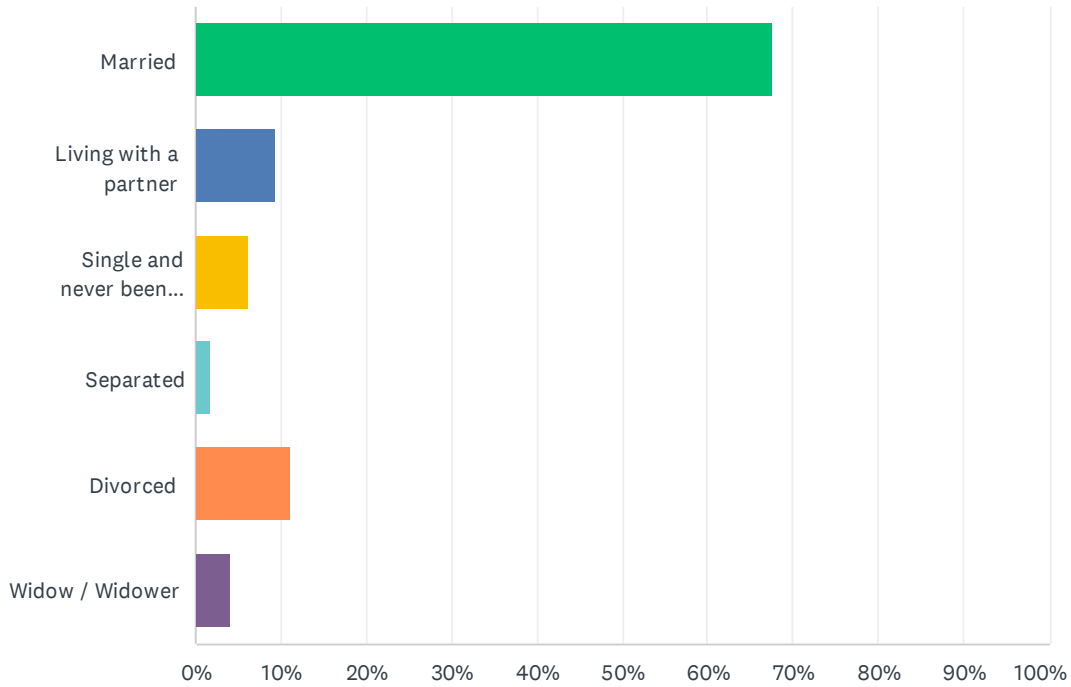
Answered: 228 Skipped: 54



ANSWER CHOICES	RESPONSES	
Yes	4.82%	11
No	88.60%	202
Prefer not to say	6.58%	15
<b>TOTAL</b>		<b>228</b>

## Q24 What is your marital status?

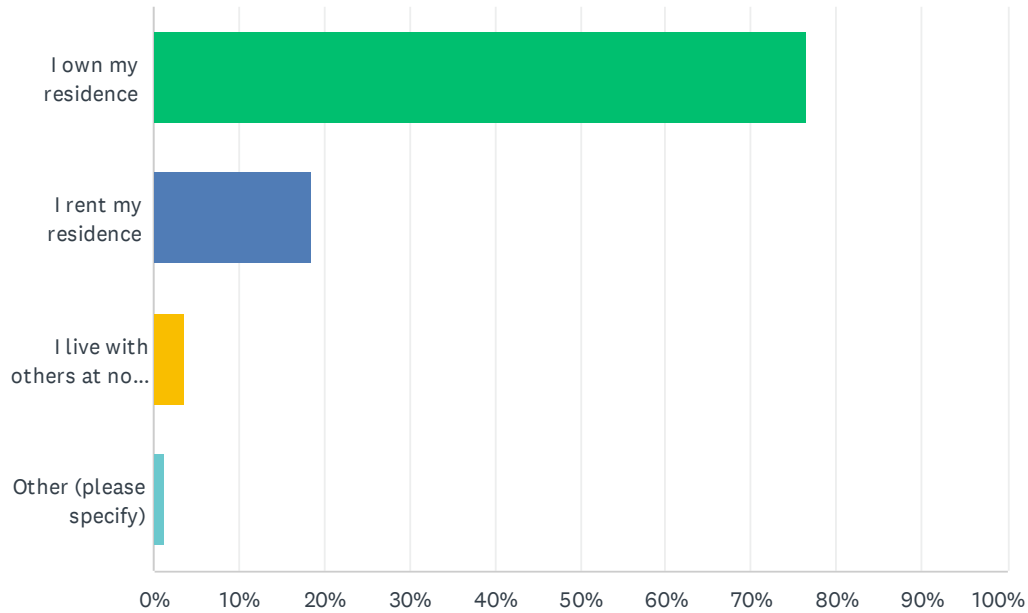
Answered: 225 Skipped: 57



ANSWER CHOICES	RESPONSES	
Married	67.56%	152
Living with a partner	9.33%	21
Single and never been married	6.22%	14
Separated	1.78%	4
Divorced	11.11%	25
Widow / Widower	4.00%	9
<b>TOTAL</b>		<b>225</b>

## Q25 Do you own or rent your residence, live with others at no cost, or something else?

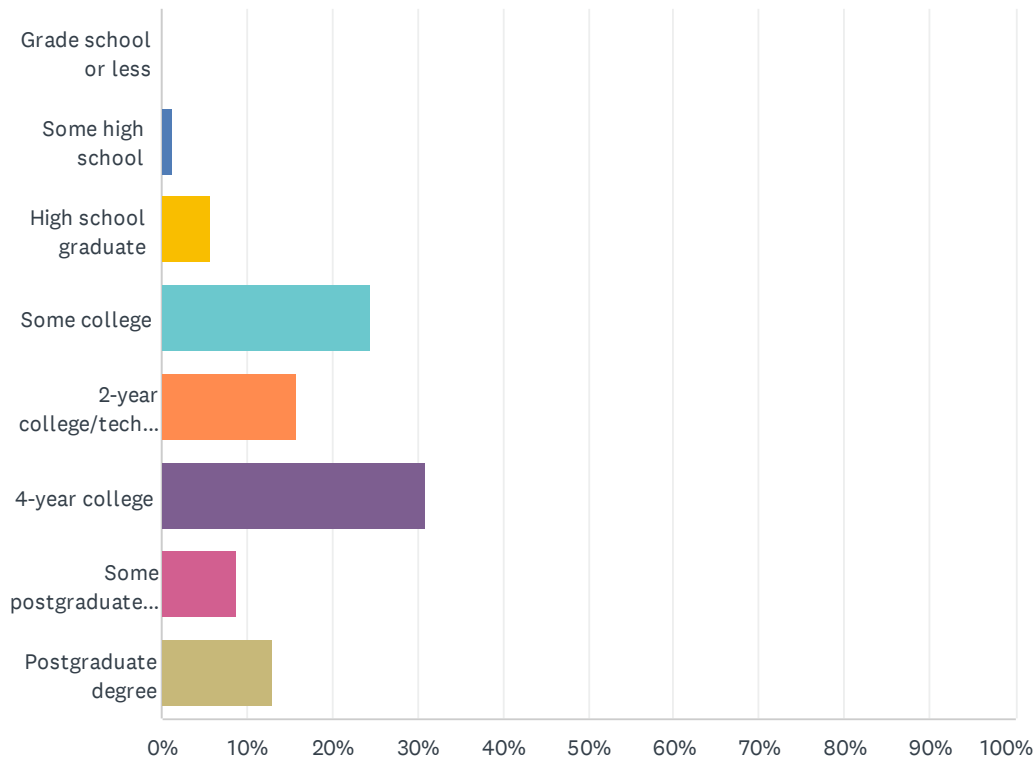
Answered: 227 Skipped: 55



ANSWER CHOICES	RESPONSES
I own my residence	76.65% 174
I rent my residence	18.50% 42
I live with others at no cost	3.52% 8
Other (please specify)	1.32% 3
<b>TOTAL</b>	<b>227</b>

## Q26 What is the highest level of formal education you have completed?

Answered: 229 Skipped: 53

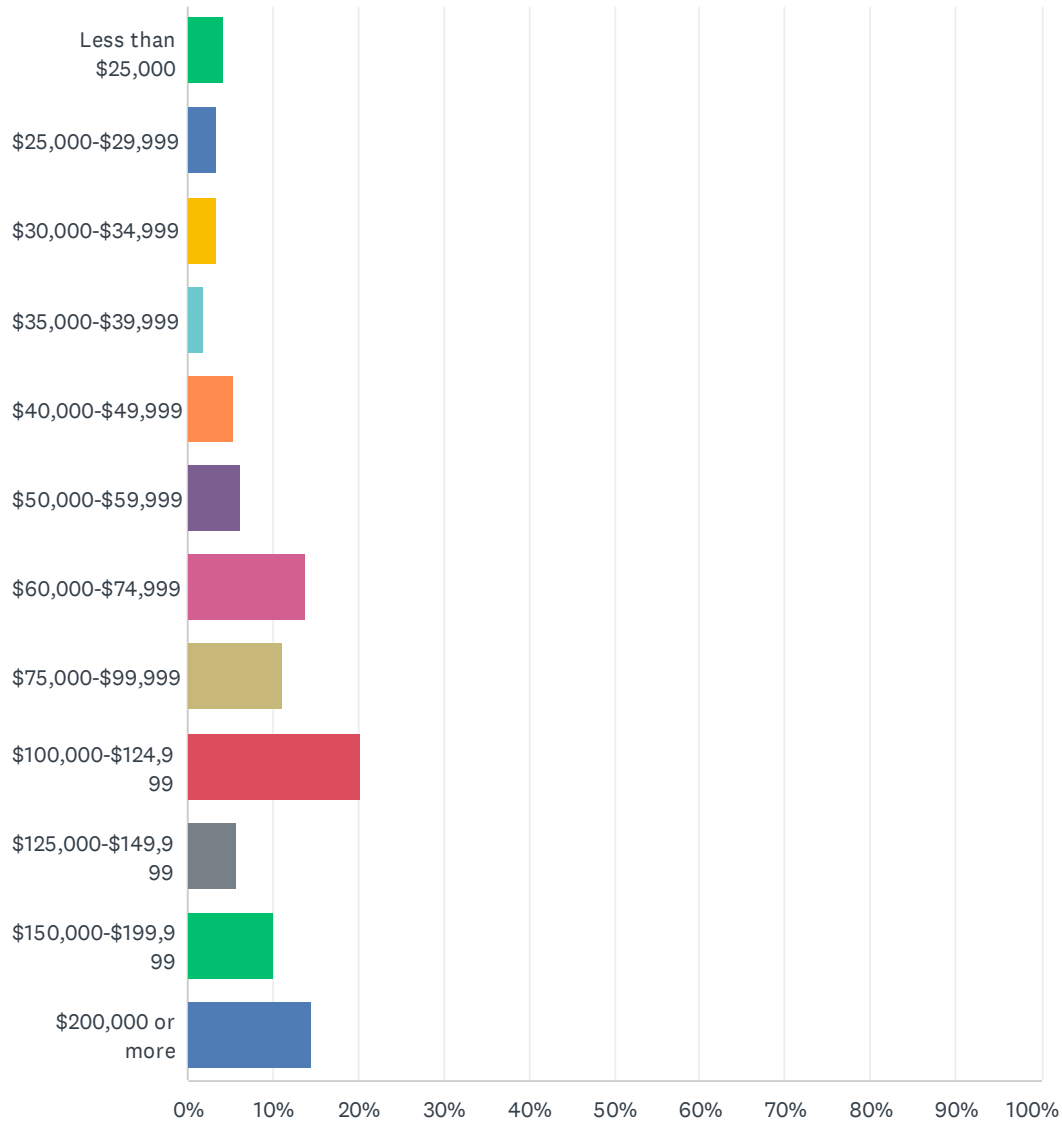


ANSWER CHOICES	RESPONSES	
Grade school or less	0.00%	0
Some high school	1.31%	3
High school graduate	5.68%	13
Some college	24.45%	56
2-year college/technical school	15.72%	36
4-year college	31.00%	71
Some postgraduate work	8.73%	20
Postgraduate degree	13.10%	30
<b>TOTAL</b>		<b>229</b>



## Q27 Which of the following ranges includes your total household income before taxes in 2020?

Answered: 208 Skipped: 74

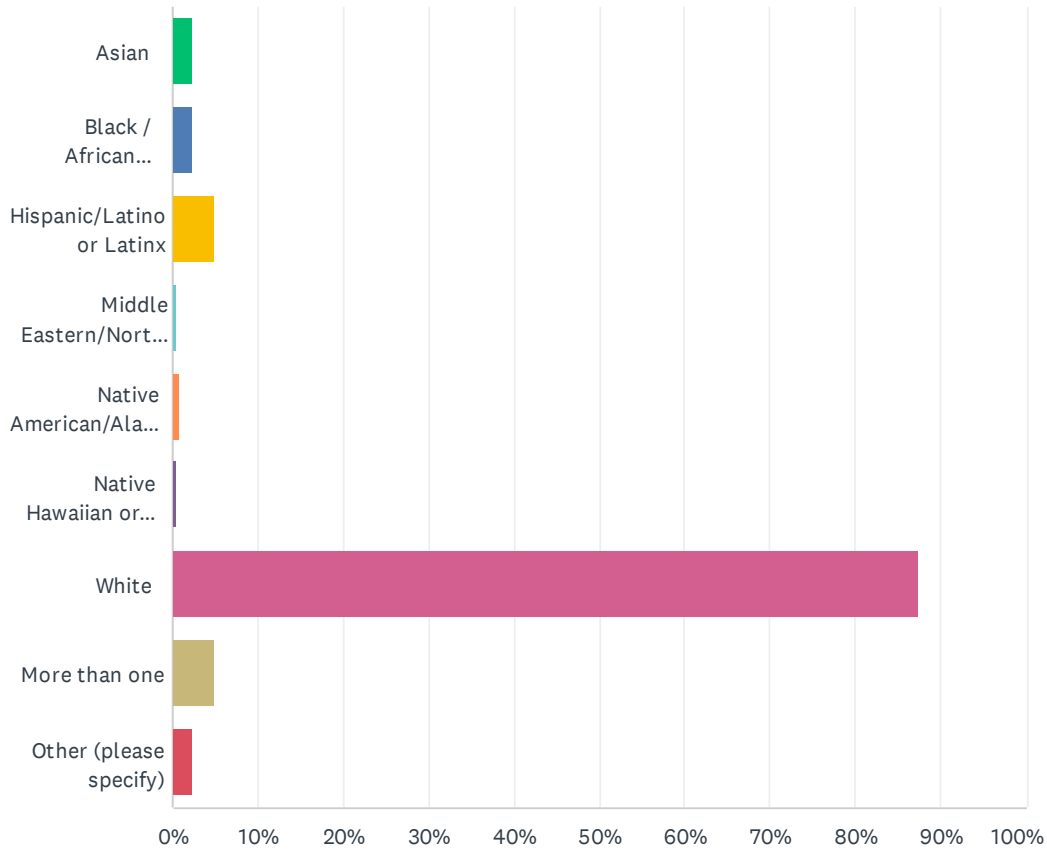


## Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
Less than \$25,000	4.33%	9
\$25,000-\$29,999	3.37%	7
\$30,000-\$34,999	3.37%	7
\$35,000-\$39,999	1.92%	4
\$40,000-\$49,999	5.29%	11
\$50,000-\$59,999	6.25%	13
\$60,000-\$74,999	13.94%	29
\$75,000-\$99,999	11.06%	23
\$100,000-\$124,999	20.19%	42
\$125,000-\$149,999	5.77%	12
\$150,000-\$199,999	10.10%	21
\$200,000 or more	14.42%	30
<b>TOTAL</b>		<b>208</b>

## Q28 Please select your race/ethnicity.

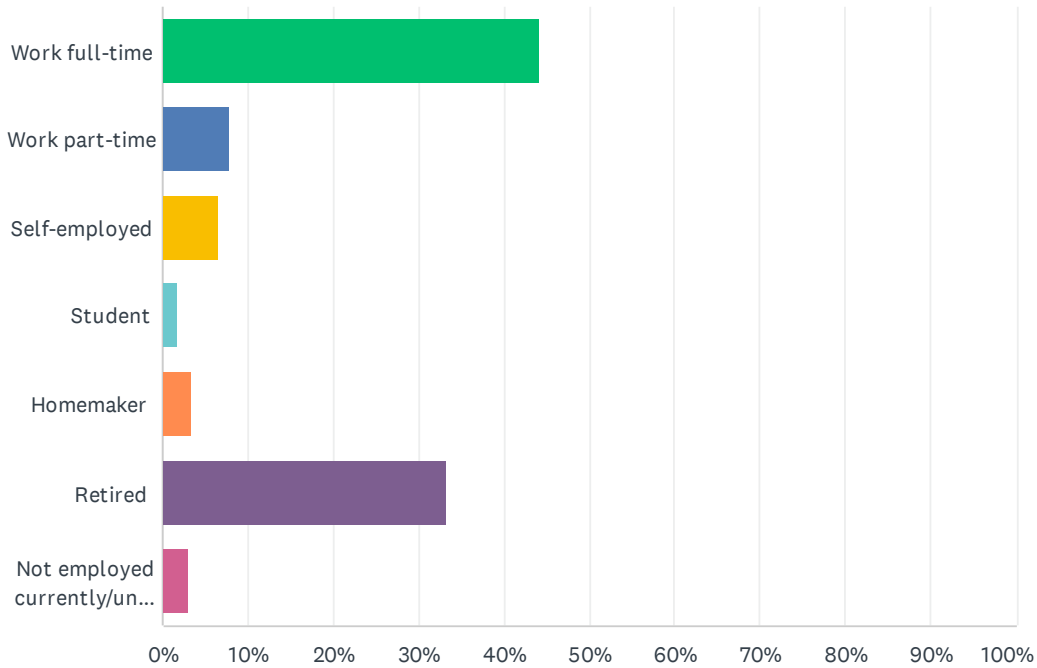
Answered: 223 Skipped: 59



ANSWER CHOICES	RESPONSES	
Asian	2.24%	5
Black / African American	2.24%	5
Hispanic/Latino or Latinx	4.93%	11
Middle Eastern/Northern African	0.45%	1
Native American/Alaskan Native	0.90%	2
Native Hawaiian or Pacific Islander	0.45%	1
White	87.44%	195
More than one	4.93%	11
Other (please specify)	2.24%	5
Total Respondents: 223		

## Q29 Which of the following best describes your current employment status?

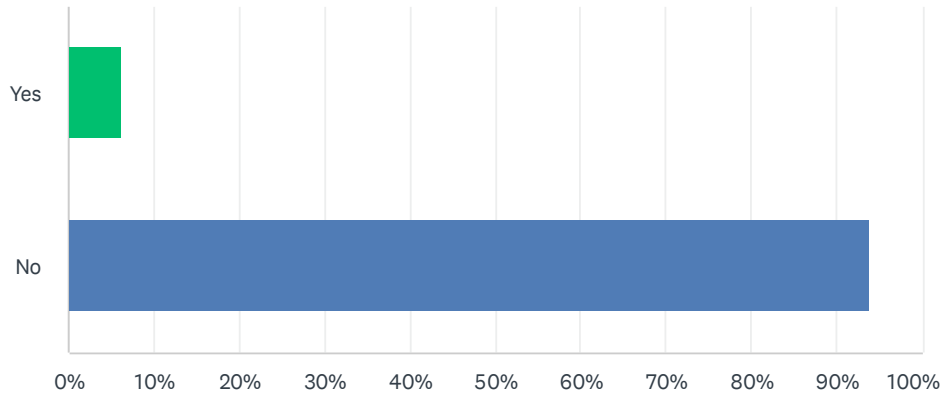
Answered: 229 Skipped: 53



ANSWER CHOICES	RESPONSES	
Work full-time	44.10%	101
Work part-time	7.86%	18
Self-employed	6.55%	15
Student	1.75%	4
Homemaker	3.49%	8
Retired	33.19%	76
Not employed currently/unable to work	3.06%	7
<b>TOTAL</b>		<b>229</b>

### Q30 Do you work in the tourism industry?

Answered: 229 Skipped: 53

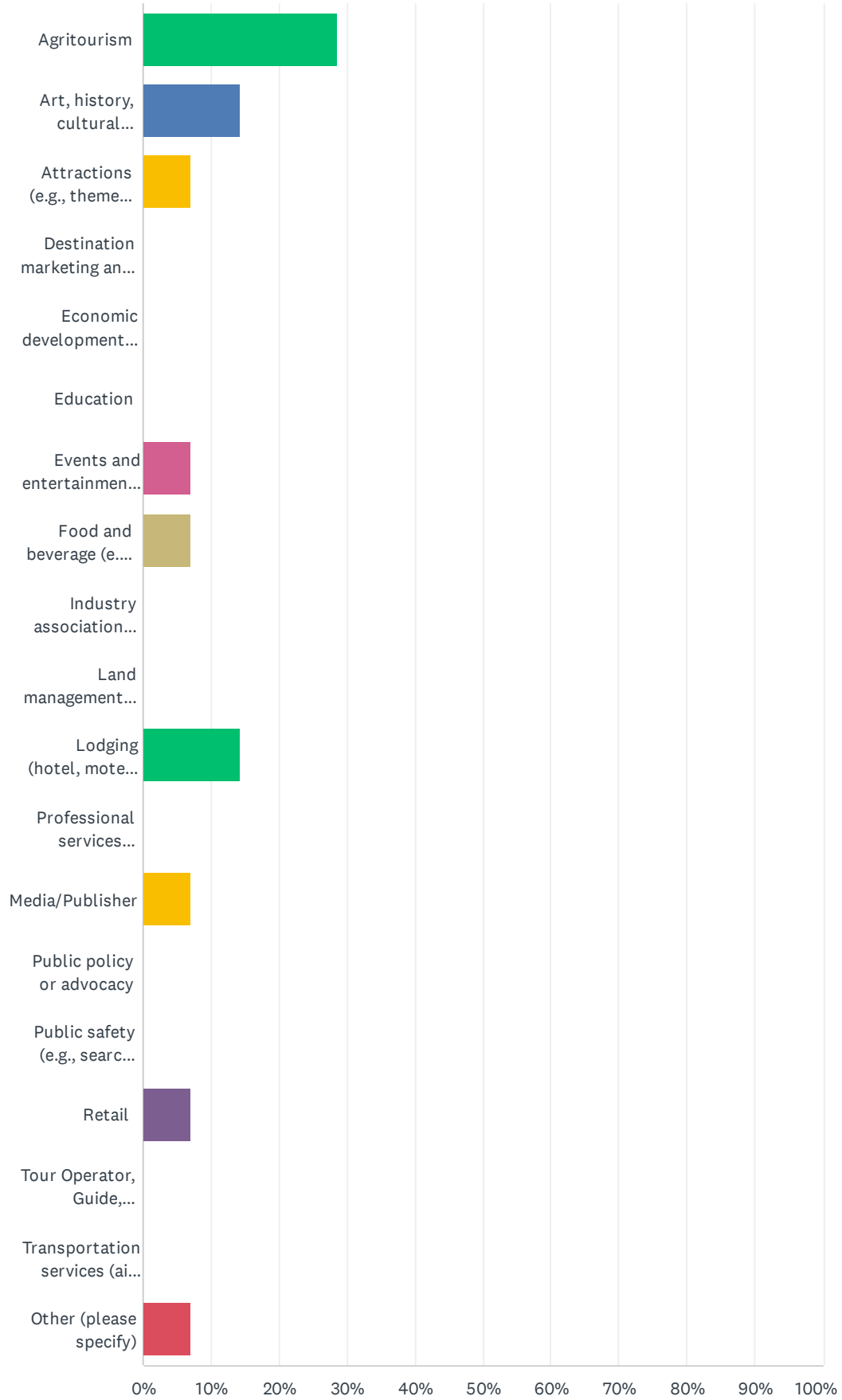


ANSWER CHOICES	RESPONSES	
Yes	6.11%	14
No	93.89%	215
TOTAL		229

## Q31 In what sector of the tourism industry do you primarily work?

Answered: 14 Skipped: 268

# Clackamas County Tourism: Resident Survey



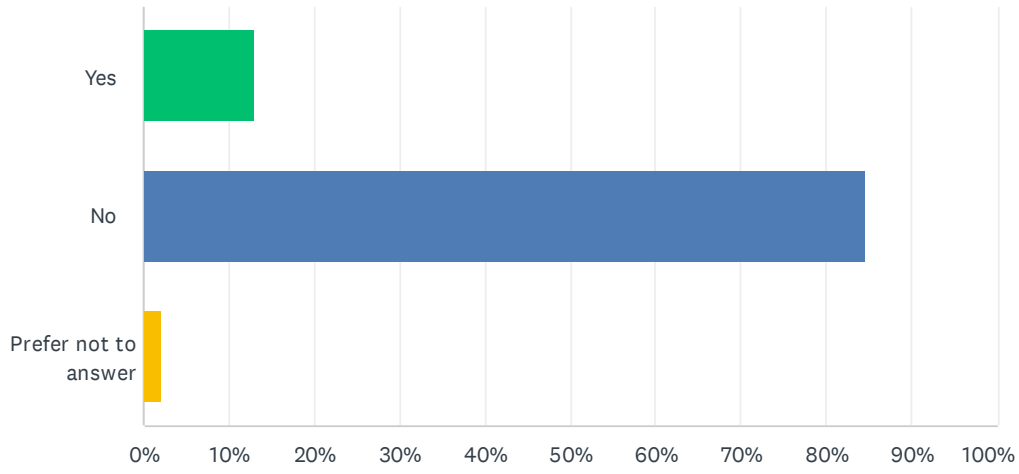
## Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
Agritourism	28.57%	4
Art, history, cultural heritage	14.29%	2
Attractions (e.g., theme park, golf course, casino, ski resort)	7.14%	1
Destination marketing and management (e.g., Travel Portland, chamber of commerce, visitor center)	0.00%	0
Economic development agency	0.00%	0
Education	0.00%	0
Events and entertainment (e.g., sports, concerts, performing arts)	7.14%	1
Food and beverage (e.g., restaurant, bar, wineries, breweries, food cart)	7.14%	1
Industry association (e.g., Oregon Restaurant & Lodging Association)	0.00%	0
Land management (maintaining or managing parks and open spaces, trails, or other outdoor recreation amenities)	0.00%	0
Lodging (hotel, motel, vacation rentals, campground, real estate)	14.29%	2
Professional services (marketing services, creative agency, website development)	0.00%	0
Media/Publisher	7.14%	1
Public policy or advocacy	0.00%	0
Public safety (e.g., search and rescue)	0.00%	0
Retail	7.14%	1
Tour Operator, Guide, Outfitter	0.00%	0
Transportation services (air, ground, water transport)	0.00%	0
Other (please specify)	7.14%	1
<b>TOTAL</b>		<b>14</b>



## Q32 Do you have a disability?

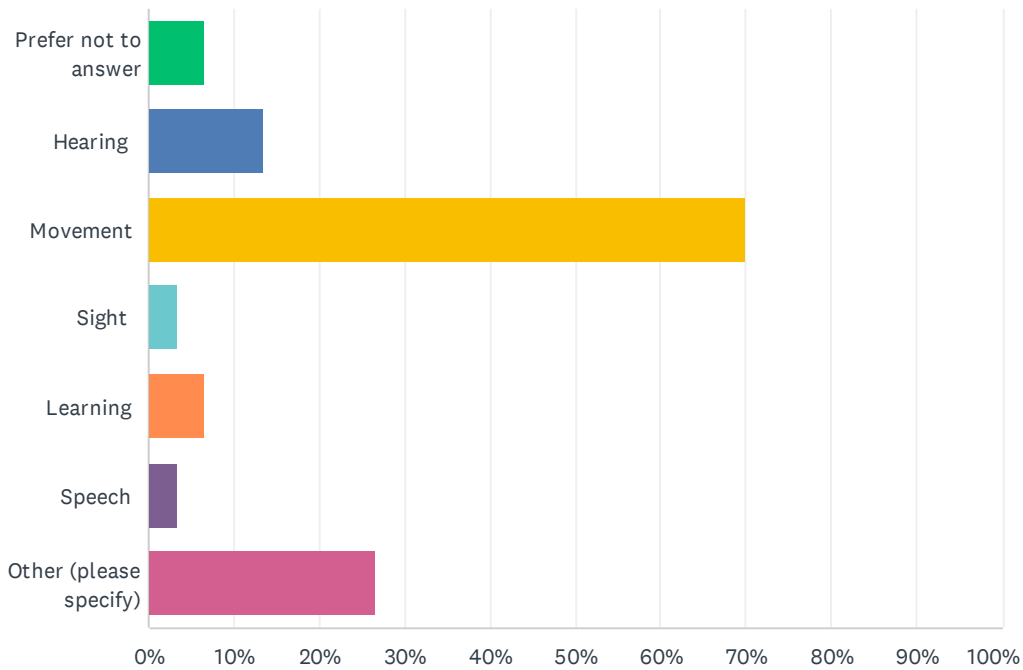
Answered: 229 Skipped: 53



ANSWER CHOICES	RESPONSES	
Yes	13.10%	30
No	84.72%	194
Prefer not to answer	2.18%	5
<b>TOTAL</b>		<b>229</b>

### Q33 What type(s) of disability do you have?

Answered: 30 Skipped: 252



ANSWER CHOICES	RESPONSES	
Prefer not to answer	6.67%	2
Hearing	13.33%	4
Movement	70.00%	21
Sight	3.33%	1
Learning	6.67%	2
Speech	3.33%	1
Other (please specify)	26.67%	8
Total Respondents: 30		